

Job Aid for the Building and Unit Collection Templates

Version 6.5

Building and Unit Collection PIH Information Center

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**Office of Public and Indian Housing
US Department of Housing and
Urban Development
451 Seventh Street, SW
Washington, DC 20410-0050**



Table of Contents

Purpose.....	2
Building Template Job Aid.....	3
Unit Template Job Aid.....	5
Building and Unit Scenarios	7
Pipe Delimited CSV File Format for Building and Unit Collection.....	9
Excel File Format for Building and Unit Collection.....	10
Troubleshooting the Building/Unit Upload Process	12
Approval of Housing Authority Information.....	14
Development Sub-module FAQs.....	15
Instruction for Enabling Macros	17



Purpose

The purpose of the following Job Aids are to help you better understand the data fields required by the Building and Unit Data Collection templates. This document has been produced as a result of feedback received during visits to various Public Housing Authorities (PHAs). The Job Aids provide a definition of the field, the way it should be populated, and the acceptable characters for each field. An electronic version of the Building and Unit Collection templates may be downloaded from the PIH Information Center (PIC) Development sub-module which you may use to upload your PHA's data.

Uploading building and unit data is a repeatable process to be used whenever the PHA has new buildings and units to add to the inventory. Once the data has been submitted to HUD and approved by the field office, the key identifying fields and the number of units may not be changed except by adding buildings and/or units as described in this job aid. Other attributes such as structure type, physical address, building name, construction date, number of bedrooms, door number (if applicable to the structure type), and ACC unit indicator.



Building Template Job Aid

No.	Building Field	Description	Instructions	Data Type / Field Length
1.	Development Number	The code that HUD uses to uniquely identify developments managed by a Housing Authority.	May not be blank. Must be a valid Development number in PIC. Character position 1- 5 is the Participant Code, character position 6 - 8 Development Number and character position 9 -11 optional suffix.	Alphanumeric Max 11
2.	Building Number	The code that uniquely identifies a building structure.	May not be blank.	Alphanumeric Max 6
3.	Building Entrance Number ¹	The code that uniquely identifies a building entrance within a development / building.	May not be blank. If only a single Building Entrance enter "1". The particular entrance corresponds to a unique physical street address. For structure types "RW" and "SD", the number of entrances must equal the number of units.	Alphanumeric Max 3
4.	Building Name	The name of the building.	Optional.	Max 50
5.	Building Type Code ²	Provides a description of the architecture of a building or building entrance.	May not be blank. The allowable values are: <ul style="list-style-type: none">• ES - Elevator Structure• RW - Row or Townhouse Style• SD - Semi-Detached• SF - Single Family/Detached• WU - Walk-Up or Multifamily Apt.• NDS – non-dwelling structure	Max 5
6.	Floor Count	How many floors are in the building where units exist that can be occupied.	May not be blank.	Integer

¹ Please refer to page 7 in this Job Aid for examples of different structure scenarios.

² The following are the standard definitions of different building types:

Elevator Structure: Any high-rise structure for which an elevator is required under the Minimum Property Standards or local building codes.

Row Dwelling: A structure containing three or more living units, each separated by vertical walls, and having individual entrances with different addresses.

Semi-Detached: A structure containing two living units separated by a common wall with two outside entrances with different addresses.

Single Family/Detached: A structure which consists of a single living unit and is surrounded by permanent open spaces.

Walk-Up/Multifamily Apartments: A multi-level low-rise structure containing two or more living units

Non-Dwelling Structure: A structure which contains no dwelling units and is used for other operational purposes (e.g., office building, garage, maintenance shop, storage building, community center, library, etc.)



Office of Public and Indian Housing
PIH Information Center

No.	Building Field	Description	Instructions	Data Type / Field Length
7.	Total Unit Count	Number of units reached through a building entrance. This total includes non-dwelling, and merged units. This total does not include fully demolished or disposed units.	May not be blank. In the units template, the number of units assigned to this particular building cannot exceed this count. For structure types "RW", "SD", and "SF", unit count must be 1 for each entrance.	Integer
8.	Construction Date	The completion date of the development. For developments with multiple buildings, this is the completion date of the last building that was complete.	Optional. A valid date in the format MM/DD/YYYY. The date may not be greater than the current date.	Date
9.	Comment Text	General comments about the building or building entrance.	Optional. General comments about the building or building entrance.	Max 2000
10.	Address Line1 Text	Number and Street (Physical address of the Building Entrance)	May not be blank. (Physical address is the address given to emergency services: fire/police).	Alphanumeric Max 255
11.	Address Line2 Text	Additional physical address if needed (Building Entrance)	Optional. (Use for supplemental address data, if needed)	Max 255
12.	City Name	City (of the Building Entrance)	May not be blank.	Max 50
13.	County Name	County (of the Building Entrance)	May not be blank.	Max 50
14.	State Code	State (of the Building Entrance)	May not be blank. A valid two-character code to identify the state or territory (US Postal Service).	Max 2
15.	Basic Zip	Zip code (of the Building Entrance)	May not be blank.	Numeric Max 5
16.	Zip Extension Code	Zip code suffix (of the Building Entrance)	Optional.	Numeric Max 4
17.	AMP Number	Asset Management Project Number	Optional -- If included, must have: 5-character HA Code + 6 digits (left-padded with 0) + the letter 'P'	Alphanumeric Fixed - 12



Unit Template Job Aid

No.	Unit Field	Description	Instructions	Data Type / Field Length
1.	Participant Code	The code that HUD uses to uniquely identify individual Housing Authorities.	May not be blank. Must be a valid Participant Code.	Alphanumeric Max 5
2.	Development Number	The code that HUD uses to identify all developments that belong to the housing authorities.	May not be blank. Must be a valid Development Number already in PIC. Character position 1-5 Participant Code, character position 6 - 8 Development Number and character position 9 -11 optional suffix.	Alphanumeric Max 11
3.	Building Number	The code that uniquely identifies a building structure within a development.	May not be blank. ³	Alphanumeric Max 6
4.	Building Entrance Number	The code that uniquely identifies a building entrance within a development / building.	May not be blank. If only a single Building Entrance enter "1". The particular entrance corresponds to a unique physical and postal address.	Alphanumeric Max 3
5.	Unit Number	Unit number within a building.	May not be blank.	Alphanumeric Max 10
6.	SSN Head	The social security number of the head of the household for each unit.	<i>Leave blank; No longer uploaded here. From Form 50058.</i>	Numeric Max 9
7.	First Name	First name of head of household occupying unit.	<i>Leave blank; no longer uploaded here. From Form 50058.</i>	Alphanumeric Max 25
8.	Last Name	Last name of head of household occupying unit.	<i>Leave blank; no longer uploaded here. From Form 50058.</i>	Alphanumeric Max 35
9.	Occupancy Date	The date that a tenant occupies a unit. This date must be the later of the lease date or move-in date.	<i>Leave blank; no longer uploaded here. From Form 50058.</i>	Date format

³ The combination of the building number and building entrance number must be unique within a development.



Office of Public and Indian Housing
PIH Information Center

No.	Unit Field	Description	Instructions	Data Type / Field Length
10.	Door Number (Apartment Number)	The code that is used as part of the physical address to uniquely identify each unit within a specific building.	May not be blank for multiple units for a single building entrance (For example, elevator structure or multifamily apt. It becomes part of the address for these building types.) Must be blank for one unit for a single building entrance (For example, a Rowhouse, Townhouse, Semi-Detached or Single Family; disregarded for these building types).	Alphanumeric Max 5
11.	Floor Number	Refers to the primary floor on which each unit is located within a building (entry way floor if multi-story unit).	May not be blank. This value should be (1) for the following building types: <ul style="list-style-type: none">• RW - Row or Townhouse Style• SD - Semi-Detached• SF - Single Family/Detached	Alphanumeric Max 3
12.	Bedroom Count	Number of bedrooms in a unit.	May not be blank. Values can be 0, 1, 2, 3, 4, 5, 6, 7, 8, 9	Integer
13	ACC Unit Ind.	Indicates whether a unit qualifies under the Annual Contribution Contract (ACC) program.	May not be blank. Must be either Y or N.	Max 1
14	Unit Designation	Indicates the type of unit that is being uploaded.	The allowable values are: <ul style="list-style-type: none">• FA - Family Unit• EL - Designated as Elderly Unit• FD - Family & Disabled• ED - Elderly & Disabled• NA - Not Applicable	Max 5



Building and Unit Scenarios

The following are three examples of different building and unit scenarios that could exist within the Housing Authority's developments. A recommended solution is given for each scenario describing how to capture the information in the corresponding building and unit files. "Physical addresses" are the addresses given to emergency services (fire, police) to find the location.

Scenario I

Property A consists of a 6-unit rowhouse building with separate entrances for each unit. The unique physical street addresses for each unit are as follows: "125-A Smith Street" ... "125-F Smith Street", etc..

Solution: Property A is a structure type "RW" that consists of one building with multiple entrances. Each of the entrances has a unique physical street address. The building file will consist of six building records with six unique building entrance numbers and the same building number. The unit file will consist of six unit records, and the (apartment) door numbers will be left blank.

Scenario II

Property B contains a multi-family structure with four stories and eight apartments on each floor. The structure has multiple physical entrances but it uses a single physical street address such as "110 Hope Street" and uses apartment numbers in the physical street addresses.

Solution: Property B is a structure type "WU (or "ES" if there is an elevator), with multiple physical entrances, and a single unique physical street address. The building file will consist of one building record with a single building entrance and address. The unit file will consist of 32 unit records with 32 unique (apartment) door numbers.

Scenario III

Property C is comprised of a multi-family structure with five stories and eight apartments on each floor. The structure has multiple physical entrances, and uses two physical street addresses. One entrance opens on 120 Green Street and leads to 20 units. Another entrance opens on 140 Brown Street and leads to 20 units.

Solution: Property C is a structure type "WU (or "ES" if there is an elevator), with multiple physical entrances, and two separate physical street addresses. The building file will consist of two building records with the same building number and with two unique building entrance numbers, each with its own physical address. In this example, the unit file will consist of 20 unit records associated with the first building entrance, and 20 unit records associated with the second building entrance. The unit file will have a total of 40 unit records (20 for each entrance number). Each unit will have an (apartment) door number that is not repeated for that entrance.



Pipe Delimited CSV File Format for Building and Unit Collection

A pipe delimited CSV file allows you to export the values in a database table as a series of ASCII text lines. A pipe symbol (|) separates each column value from the next column value, and each row starts a new line. When you decide to submit your data in the CSV format you must ensure that the text file is correctly formatted. Each row of data must be structured in the order that is specified in the detailed instructions listed below. If a specific column for a row of data is not available and is not required you must still insert a placeholder for that column by adding a pipe (|). Please follow the detailed instructions on the file layout and content. Do not leave blank rows within the data.

File Format

You will be required to submit separate files for your building and unit records.

1. All files should have **.csv** as the file extension. For example: buildingfile.csv.
2. The first row of all files must contain a header that identifies the subsequent records.
3. All rows of data records must be separated by a new line or hard return.

Examine the examples below for guidance on how to format your data for submission to HUD.

Example of two Building records in CSV format. File name: buildingfile.csv

development_number|building_number|building_number_entrance|building_name|building_type_code|floor_count|unit_count|construction_date|comment_text|address_line1_text|address_line2_text|city_name|county_name|state_code|basic_zip_code|zip_extension_code

```
AK001005 | 300 | 1 | Plaza 1 | ES | 12 | 10000 | 06/06/2000 | high rise Building | 1401 SOUTH Street | | Fair City | A County | AK |  
20001 | 1002  
AK001005 | 302 | 1 | Garden | ES | 12 | 10000 | 06/06/2000 | high rise Building | 1401 SOUTH Street | | Fair City | A County | AK |  
20001 | 1002
```

Example of two Unit Records in CSV format. File name: unitfile.csv

participant_code|development_number|building_number|building_number_entrance|unit_number|ssn_head|first_name|last_name|occupancy_date|door_number|floor_number|bedroom_count|acc_unit_ind|unit designation

```
AK001| AK00100511 | 300 | 1 | A1234 | (leave blank) | (leave blank) | (leave blank) | (leave blank) | A1 | 3 | 2 | Y | FA  
AK001| AK00100511 | 300 | 1 | A1236 | (leave blank) | (leave blank) | (leave blank) | (leave blank) | A1 | 3 | 2 | Y | FA
```



Excel File Format for Building and Unit Collection

The following outlines the Excel file format available for the Building and Unit Collection that users may download within the PIC Development sub-module. The Job Aids directly correlate to the fields within this template. The format illustrated below outlines the two worksheets for the building and unit data that are found within one Excel file.

Excel Worksheet 1: P113PT_DEVELOPMENT_BUILDING_ENT

development_number	building_number	building_number_entrance	building_name	building_type_code	floor_count	unit_count	construction_date	comment_text	address_line1_text	address_line2_text	city_name	county_name	state_code	basic_zip_code	zip_extension_code
AK001005	A1	1	This is a test	WU	22	150	06/06/00	This building is a high rise one	1401 North Scott Street		Arlington	Washington	AK	92201	1234

Excel Worksheet 2: P113PT_PH_UNIT

participant_code	development_number	building_number	building_number_entrance	unit_number	ssn_head	first_name	last_name	occupancy_date	door_number	floor_number	bedroom_count	acc_unit_ind	unit designation
AK001	AK001005	A1	1	137	(leave blank)	(leave blank)	(leave blank)	(leave blank)	A12	6	2	Y	FA

Note: When using the Excel worksheet from PIC, please delete the sample record from the template file before submitting the data. Do not leave blank rows within the data.



Summary of Modifications to Job Aid

dated April 17, 2001

The following modifications were incorporated into the Job Aids for Building and Unit Collection Templates, version 6.3, dated April 17, 2001.

- Inserted a page break between the Unit and Building Templates.
- On page 6, instructions on the bedroom count now reads “Values can be 0, 1, 2, 3, 4, 5, 6, 7, 8, 9”.
- On page 6, instructions on the unit tenant type now reads “Should be blank if the unit is vacant.”
- Changed IIII to III on the Scenario on page 8.
- Removed Scenario IV on page 9.
- On page 10, under the CSV file example, corrected spelling for the building_type_code.

Summary of Modifications to Job Aid

dated January 26, 2006

- On page 2, added further explanatory comments.
- On page 3, revised and clarified the structure type and other definitions
- On page 4, added explanatory comments to descriptions and instructions to clarify usage; comment text field length changed from 255 to 2000.
- On page 5, instructed users to leave SSN, First Name, Last Name, and Occupancy Date blank (data comes only from Form HUD 50058).
- On page 6, Unit Tenant Type and Unit Details Complete Indicator fields are removed
- On page 6, unit_type code is renamed to unit designation



- On page 6, Merged Unit and Non Dwelling Units are removed from allowable values of unit designation
- On page 6, Elderly Disabled and Family Disabled are added to the allowable values of unit designation
- On page, revised three scenarios to clarify distinctions and provide better examples.
- On page 8, unit_tenant_type_code and unit_details_complete_ind are removed from unitfile.csv format.
- On page 8, unit_type_code is renamed to unit_designation; corrected errors in examples and reminded users to avoid blank rows within the data
- On page 9, unit_tenant_type_code and unit_details_complete_ind columns are removed from P113PT_PH_UNIT; ; corrected errors in examples and reminded users to avoid blank rows within the data
- On page 9, unit_type_code column is renamed to unit_designation from P113PT_PH_UNIT



Troubleshooting the Building/Unit Upload Process

Key Questions That You Must Ask the User

1. What PHA Code are you accessing to upload data?
2. What is the development number for which you are uploading data?
3. What file type are you uploading? Excel or Pipe Delimited CSV?
4. What is the file extension of the file that you are attempting to upload? (For example: .xls, .csv)
5. Did you run the macro on the spreadsheet (if applicable) right before you uploaded?
6. What time did you upload the file?
7. Did you receive an upload error file?
8. Did any errors occur in the upload error list?

Common File Upload Problems

No.	Problem	Steps to Solution and Solution
1.	User cannot upload a file; a validation error occurs that states the file is not a valid excel or .csv file. The user clicked browse from the data transfer page and selected the file to be uploaded from their computer. The error occurs immediately once the user clicks the upload button.	This problem occurs when the file that is being uploaded has an invalid file extension.. The only valid file extensions that can be uploaded are .xls and .csv. Solution: Have the user change the file extension to one of the approved extensions and upload the record.
2.	User uploaded a .csv unit file and no buildings or units were saved in their building or unit list page.	This problem may occur if the users are using a .csv file that does not contain a header record. Solution: The user must ensure that the file is in the correct format as outlined in the job aid and .csv template. The user should insert a header record and upload the record. The building file heading should be P113PT_DEVELOPMENT_BUILDING_ENT and the unit file heading should be: P113PT_PH_UNIT
3.	User uploads a file and encounters more errors than they had records in the file that was uploaded.	This situation could occur if the user uploaded the file more than one time in the same day. Check for blank rows within the data
4.	User uploads an excel file to the server and no records were added to the list of buildings and units.	Check to ensure that the user is looking at the correct development. . Check for blank rows within the data.
5.	User uploaded a .csv unit file and no units were saved in their unit list page.	Check to ensure that the user is looking at the correct development.
6.	User encounters a validation error in the upload error report that states: Alpha-numeric in Numeric Only field.	Compare the data type with what is in the actual file that was uploaded and have the user make the necessary modification.
7.	User encounters a validation error in the upload error report that states: Invalid building type code	Check to ensure that the codes are valid as per the job aid. Only SF, SD, RW, WU, ES, or ND may be used.
8.	User encounters a validation error in the upload error report that states: Invalid Building Number	Verify that the building number used in the unit table exists verbatim in the building file or sheet.
9.	User encounters a validation error in the upload error report that states: Invalid Floor No.	Crosscheck in the building file or sheet
10.	User encounters a validation error in the	Crosscheck against the building record and the job aid.



No.	Problem	Steps to Solution and Solution
	upload error report that states: Invalid Participant Code	
11.	User encounters a validation error in the upload error report that states: Invalid/Blank character found	Crosscheck against the building record and the job aid. Verify that all the spreadsheet fields have the apostrophe (') character on front of the values.
12.	User encounters a validation error in the upload error report that states: Invalid development number or development does not belong to this HA.	Verify that the user has the access rights to upload data for the development in question. Verify that the development number does not contain any characters like “dashes” (-). The correct format is state code + ha number + project number. For example, TX326001. Verify that the user is selecting the HA code that corresponds to the HA code in the file to be uploaded.
13.	User encounters a validation error in the upload error report that states: Invalid State Code.	Check to ensure that the codes are valid as per the job aid.
14.	User encounters a validation error in the upload error report that states: Total No. Units do not match unit count on building.	Cross check with the building record. If the unit count in the building table is wrong, correct it. You cannot successfully upload more unit records than the total in the building table.
15.	User encounters a validation error in the upload error report that states: Vacant Unit contained Head of household information	Verify that this is indeed the issue.



Approval of Housing Authority Information

After the Housing Authority (HA) user has formally submitted changes in the building/unit information to the Field Office, the Field Office has the ability to approve or reject this information.

The **Housing Authority Approval** page provides a summary of actions concerning any submitted changes to the building/unit information.

HUD HOME PIH HOME Q & A SEARCH/INDEX E-MAIL

Development Building Unit Submission **Approval**

HA Approval

MA001 MA001 Lowell Housing Authority

Review Comments and Approve Unit Information

Number	Name	Total Units	Vacant Units	Employee Units	Handicapped Units	Reviewed
MA001001	NORTH COMMON VILLAGE	6	0	20	4	<input checked="" type="checkbox"/>
MA001002	G W FLANAGAN PROJ	0	0	20	0	<input checked="" type="checkbox"/>
MA001003	BISHOP MARKHAM PROJ	0	0	20	0	<input checked="" type="checkbox"/>
MA001004	FAULKNER PROJ	0	0	20	0	<input checked="" type="checkbox"/>
MA001005	MARTIN E NORTON PROJ	0	0	20	0	<input checked="" type="checkbox"/>
MA001006	ARCHAMBAULT TOWERS	0	0	20	0	<input checked="" type="checkbox"/>
MA001007	HARTWELL PROJ	0	0	20	0	<input checked="" type="checkbox"/>
MA001011	FRANCIS GATEHOUSE MILL	0	0	20	0	<input checked="" type="checkbox"/>
MA001012	SCATTERED SITES	0	0	20	0	<input checked="" type="checkbox"/>
MA001014	LOWELL HA	0	0	20	0	<input checked="" type="checkbox"/>

Select All Deselect All

Submission Comments (Read Only)

This is the new comment

By clicking Approve Data, you will be approving all of the data that this Housing Authority submitted as a part of the Capital Fund Data Verification Process.

Approve Reject

Approve button

1. Review the unit information in the table, and the associated comments. Ensure that structure types “SD” and “RW” have only one unit per entrance. If you find a discrepancy, the PHA must rework it and resubmit. Click on the **Reviewed** check box to indicate a development has been reviewed.
2. If there are no discrepancies, click on the **Approve** button. Clicking the **Approve** button approves the building/unit upload information for the respective HA and recalculates all unit and building totals and subtotals for the PHA. To enable the PHA rework their information and resubmit their data, click on the **Reject** button.

Note: Make sure to click on the Save button after marking a group of developments as reviewed.



Development Sub-module FAQs

What is the purpose of the Development sub-module?

The Development sub-module provides a flexible method of submitting development and unit occupancy information to HUD. As a result of automating the collection/approval process for unit information, HUD has a better understanding of housing resources nationwide.

If I already have a log-in for the PIC system, will I need an additional password for the Development sub-module?

No, you will only need one User ID and password for the entire PIC system. Your User ID and password will give you access to the other sub-modules. Remember User IDs, and passwords, are all case sensitive.

How long can the user access PIC before their password expires?

Passwords expire after 60 days. The expiration date of the password is not related to the expiration date of the user's account.

What is the online unit collection process?

You may upload your unit information in batch form by using the template provided on the **Building/Unit Data Transfer**. Once you successfully upload the information to the system without errors, it is saved and may be officially submitted by the Housing Authority Executive Director or their delegate. Once submitted, the Field Office will either approve the information as its final acceptance by HUD.

In what ways am I able to manipulate the development and unit information?

Users with the appropriate access rights are allowed to add, modify, and delete information. If you need to add a development, please submit a written request to HUD through your Field Office.

Can I delete building and unit information?

Yes, the delete functionality is available in PIC for data which has not been approved by HUD and has not been submitted for approval..

What types of files can be uploaded?

The system currently offers two templates you can download and modify by adding your information: Pipe Delimited CSV File and Excel. Once modified, either of these file types may be uploaded to the system. (For more information, see the Pipe Delimited CSV File Format for Building and Unit Collection Excel File Format for Building and Unit Collection on pages 10 - 11.) If you are using the Excel spreadsheet, you must use the one downloaded from PIC and you must run the macro before uploading to catch errors.

Once the uploading process is complete, will subsequent uploads override all of the existing data?



The subsequent uploads will not override existing information if the uploads contain new key numbers. For example, if the building information being uploaded has new building numbers and new building entrance numbers, that information will be appended to the existing uploaded information. If the numbers are the same, the new upload will override the existing information. The same scenarios apply for the unit information upload. The PIC database keys are the building number and building entrance number for building information and the unit number for unit information.

Where can the uploaded information be viewed?

The uploaded information can be viewed on the Building Profile page or the Unit List page within the Development sub-module. If the information does not appear on these pages, please review the upload errors on the Upload Error Report page.

How long does it take the upload data to appear in PIC?

If there are no upload errors, the information should be displayed between 15 minutes and one hour.

Will PICHelp be able to see the file that I uploaded to the system?

No, the PIC Hotline will not be able to pull up your upload file and view it while giving assistance unless you send it to them separately. PICHelp can see the results of the upload and the upload error report. Current security restrictions prevent widespread, immediate access to the uploaded information.

I am a new user of the Development sub-module and need assistance. How do I get help?

There are two forms of on-line help. If you click the Help link on the left side of the page, you will receive information for the specific page you are on. Also, you may click on the Guided Tour link on the left side of the page to walk through the entire Development sub-module. You may also call PICHelp toll-free at 1-800-366-6827.



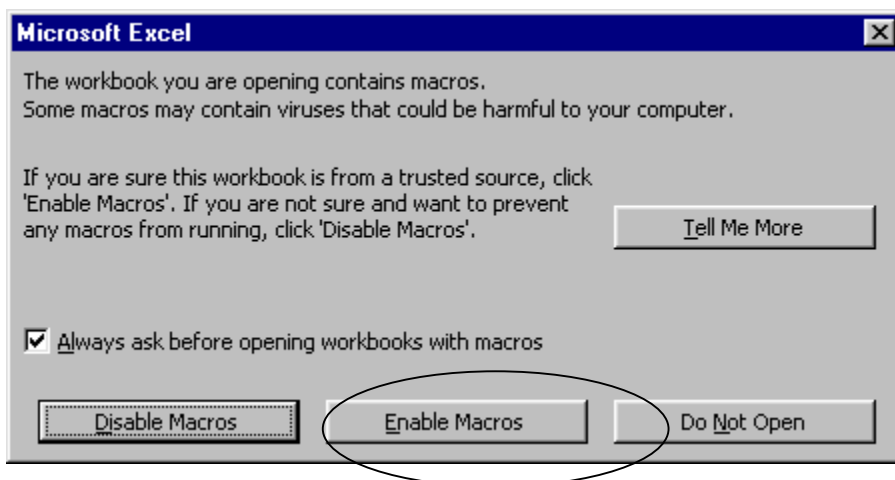
Instructions for Enabling Macros

The purpose of this guide is to explain to PIH Information Center (PIC) users how to enable macros in the Microsoft Excel template used in the building/unit upload process of the Development sub-module. Users should find these step-by-step instructions easy to follow. We have created a program within Excel called a macro that will check for common formatting errors in the Excel spreadsheet. Users are requested to run the macro any time before they upload the excel file to PIC. This macro is harmless and will not affect the running of your computer. Once you run the macro it will:

- format any columns that have been inadvertently unformatted during the data entry process, and
- it will check to ensure that the Excel worksheet names are correct.

By enabling macros within the Excel template and running the macro, many of the upload errors previously experienced should be eliminated.

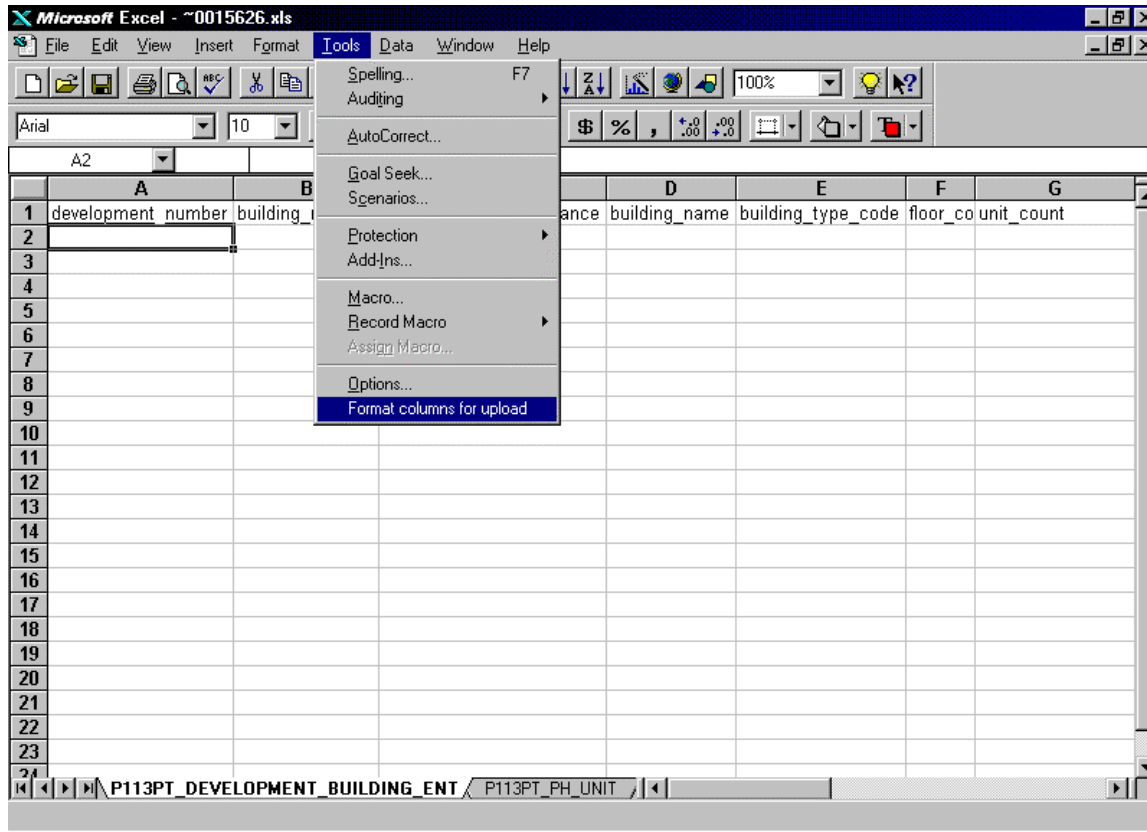
1. Download the Excel template from the PIC Development sub-module's **Building/Unit Data Transfer** page. Choose to "Save it to disk" rather than opening the file immediately.
2. When you open the spreadsheet you *may* be presented with a dialog box warning you about the danger of harmful macros. If you are presented with a warning message, click on the **Enable Macros** button. If you do not receive the message, this means that your computer has been configured to enable all macros, and you may skip this step.



3. Enter your data into the spreadsheet.



4. To run the macro, while your spreadsheet is open, go to the Excel toolbar and select **Tools**. Then select the **Format columns for upload** menu choice.



The macro will automatically run and format your data for submission.

5. Save and submit your data as usual.